MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

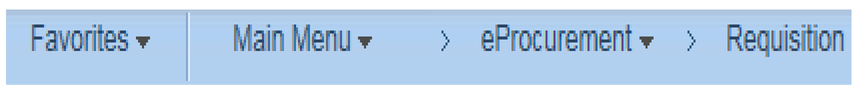
Quick Reference Tip Sheet

LAST REVISED DATE: 05/01/2017

General Information

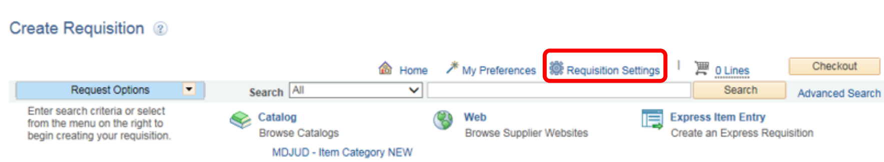
Task	Process Information
Creating an eProcurement Requisition	A requisition is created in the eProcurement module for procuring goods/services. **NOTE - for AOC, District Court, Circuit Courts, Appellate Courts, and Programs:** Per the FY17 Procurement Policy Change, Receipts will no longer be REQUIRED for Services under Corporate POs (POs created by DPCGA). However, receipts are required for all Goods received, and POs created by DPCGA for Goods will be set to Receipt Required. If you have purchases from a vendor for both Goods and Services, please make sure you create separate lines on your Requisition, so separate lines will be created on your PO. If there is any question by DPCGA as to whether the item is considered Goods or Services, the PO will default to Receipt Required. The Line Details on your PO will indicate if receiving is required. If you want Receipts for Services on your PO, please indicate this request on your Requisition.

GEARS Navigation

Main Menu > eProcurement > Requisition	

1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	**Click on the link Requisition Settings. This is where you'll setup the defaults for your Requisition.**	

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On the pop-up window that opens, enter your Requisition name.

NOTES:

1. It is important to give your requisition a meaningful name to make it easier to find later. Be sure to start the Requisition Name with the corresponding AY year. For example, AY17 Adobe Products.

Requisition Name:

2. Click on the **Override** radio button.

The defaults entered on steps 3 & 4 will populate on ALL your requisition lines.

3. Enter the **Ship To, Due Date** and **Attention** fields, if needed.

4. To use the **SpeedChart** field, you can search for your PCA by using the 🔍 feature. Notice that the **Account** and **Approp Yr** Chartfields are blank. Enter the **Approp Yr** and leave the **Account** blank.

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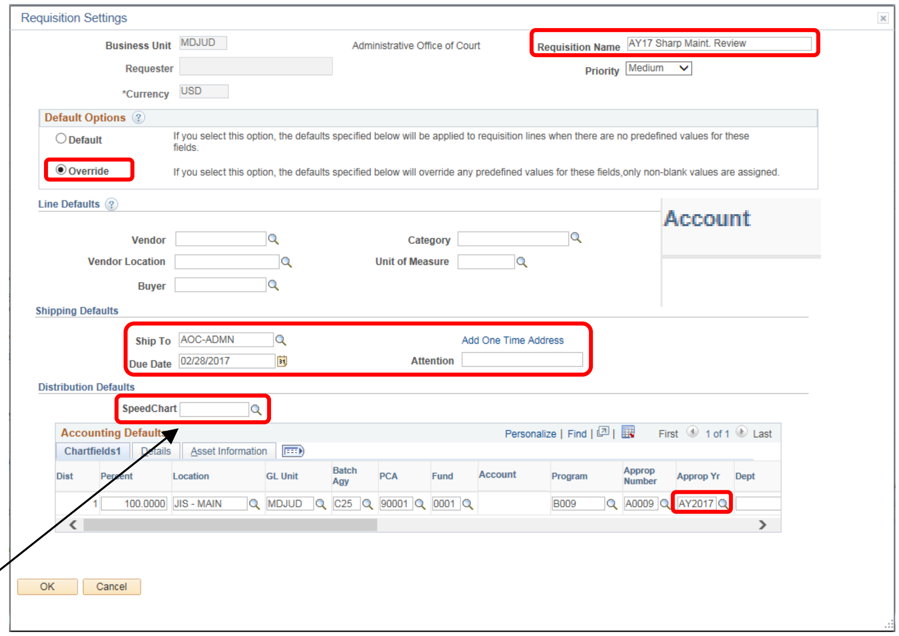

Multiple PCA's per line: If you need to divide the expenses on your Req. lines to multiple PCA's on a percentage basis, it can be done on this page. Please contact GEARS support, if you need help with this feature.

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<td>3.</td>
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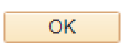
Click the  **button.**

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<td>4.</td>
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Click on the link Special Requests.

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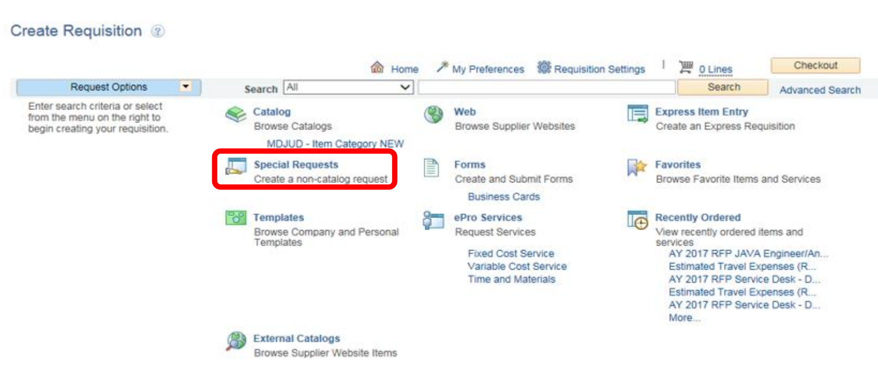

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<td>5.</td>
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Add items and/or services.

Fill in all fields marked with an asterisk (Item Description, Price, Quantity, and Unit of Measure).

Note: You can search for the Category by selecting the magnifying glass.

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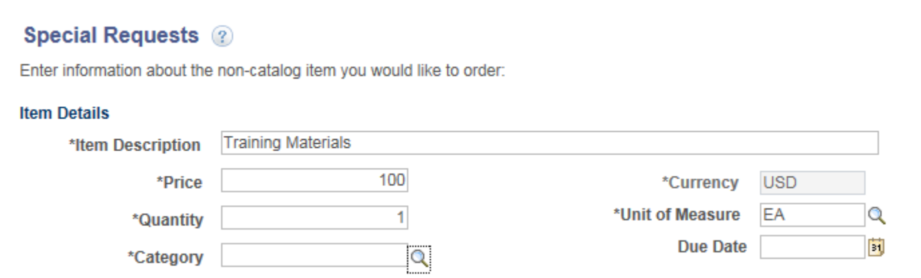

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6. **On the Look Up Category screen.**

Choose either Search Categories or Browse Category Tree to look up the appropriate category for your requisition.

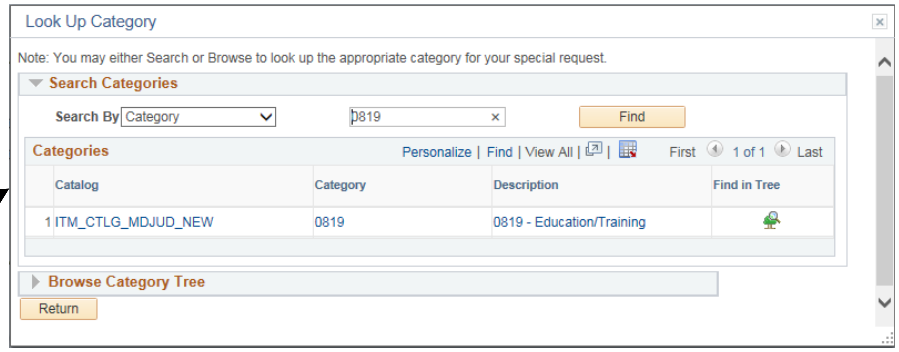
NOTE: Do either 6a or 6b.

6a. **To** Search Categories

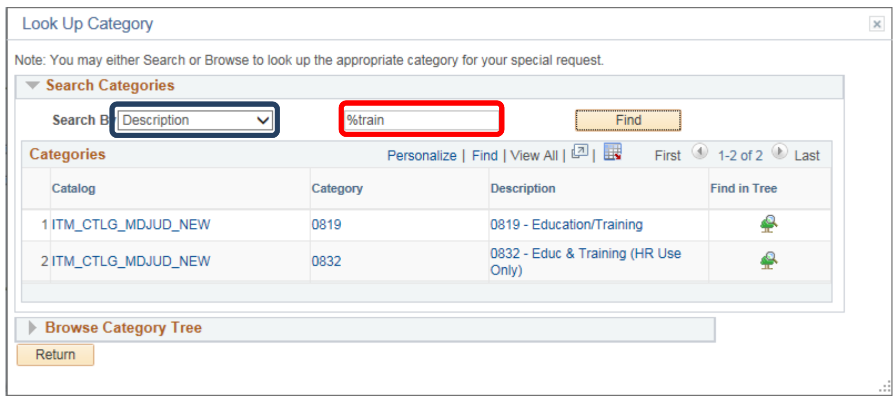
Note: The category Codes are the same as our existing account codes.

If you know the appropriate account code for your purchase, you can enter it, as the category code will be the same.

You can look up Category by **Account #**



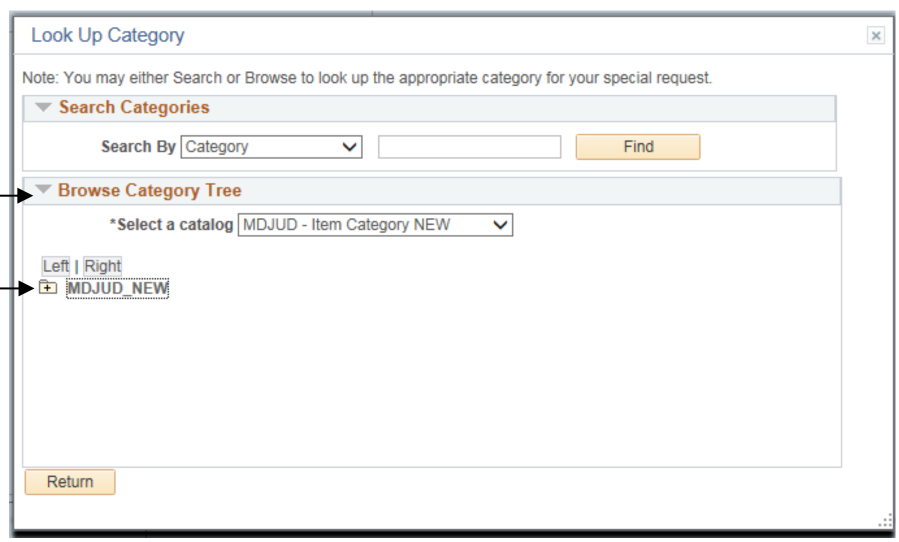
You can also look up Categories by **Description** *(be sure to change the Search By value to 'Description')*. The **%** before the search keyword will look for the search keyword anywhere within the **Description**. In this case, the system searches for the word **train** in all the category descriptions.



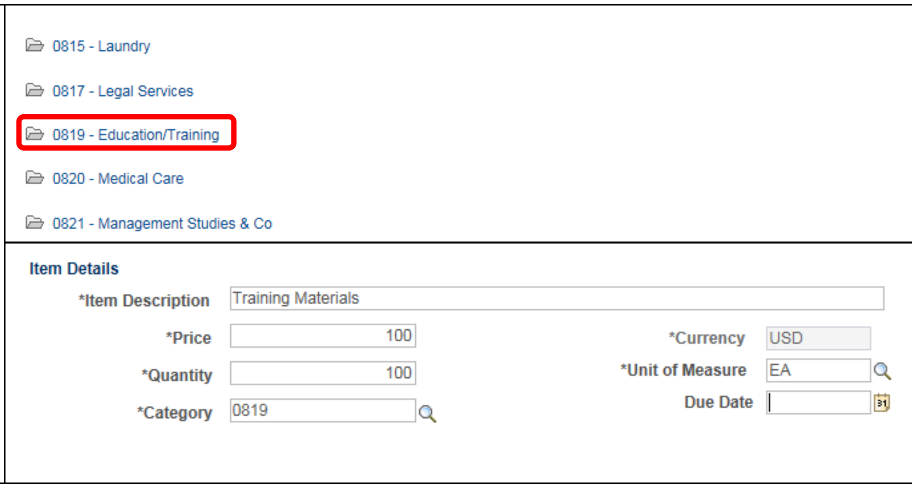
6b. **To** Browse Category Tree

- Expand the section by clicking the ▸
- Select a catalog from the dropdown list and click the ⊞ to browse the categories within.

For example, if the account code to be used on your requisition line is 0819 (Education/Training), you would choose 0819 as the category.

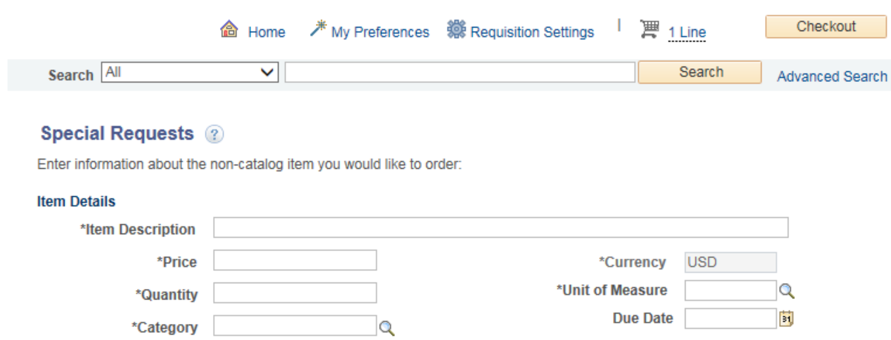


- Select the row containing the good/service you wish to procure.
- Your selection will appear in the Category field on the “Add Items and Services” screen.



7. **Click the** Add to Cart **button.**

8. **If you’re requesting multiple items, you can continue adding Items to your cart. When you are done adding Items, click on the** Checkout **button.**



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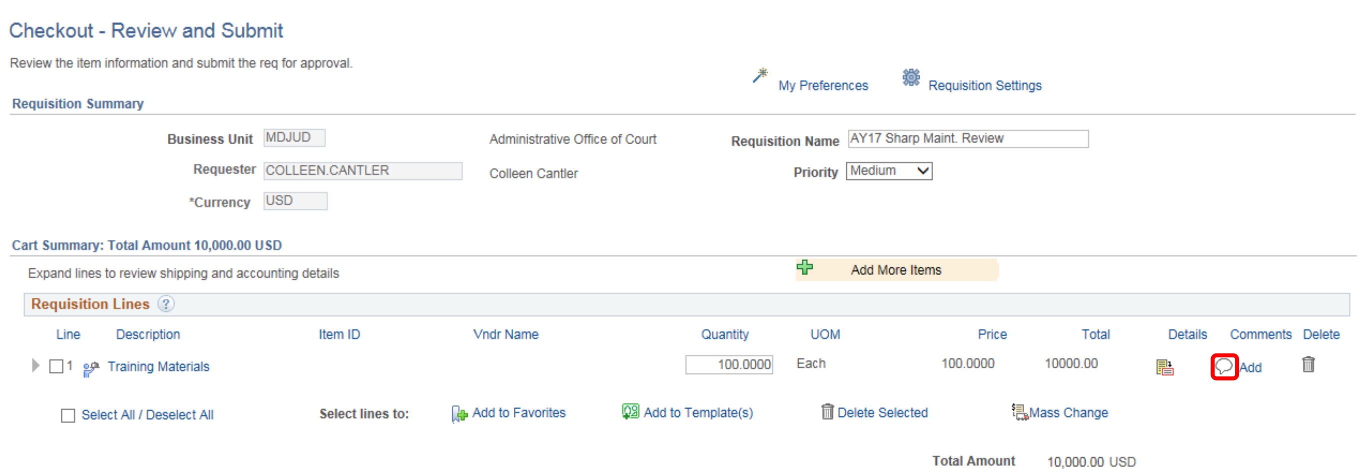
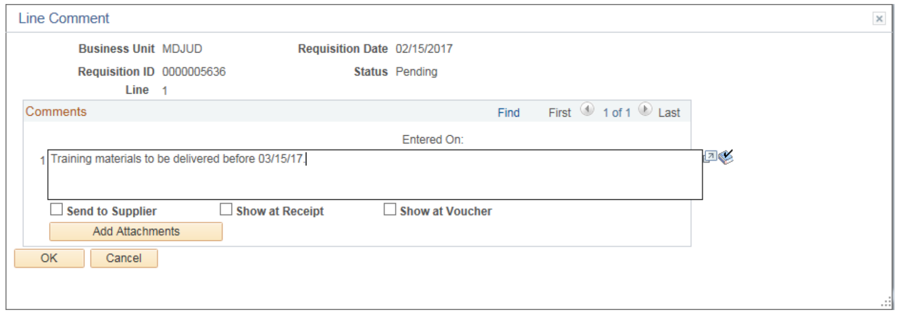


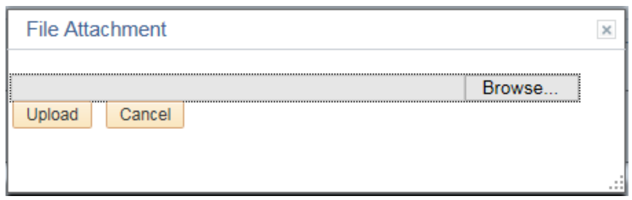
To add comments or attchments about line items, select the icon at the far right of the line.

10.

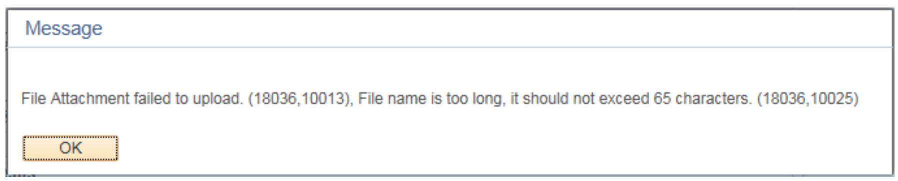
You can add comments in the comments section and click on the Add Attachments icon to add attachments.



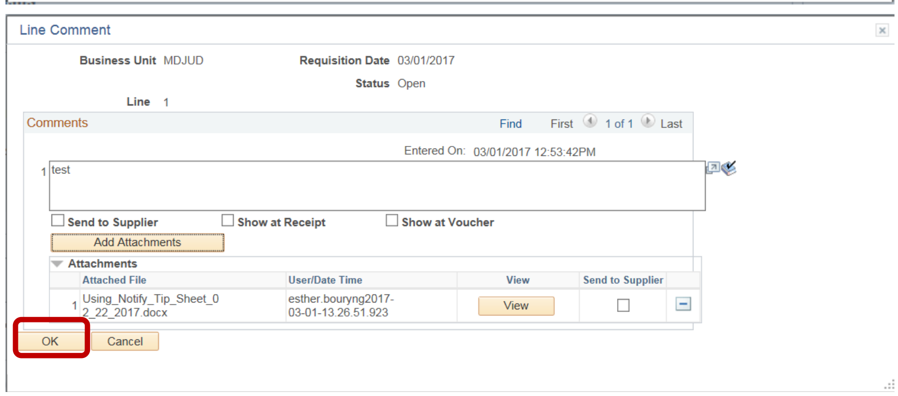
Navigate to the location of your file by clicking **Browse**, select your file and then click the **Upload** button.



Note: Please ensure that the file name does not exceed 65 characters as it will fail.



After the attachment has been successfully uploaded, click the OK button.



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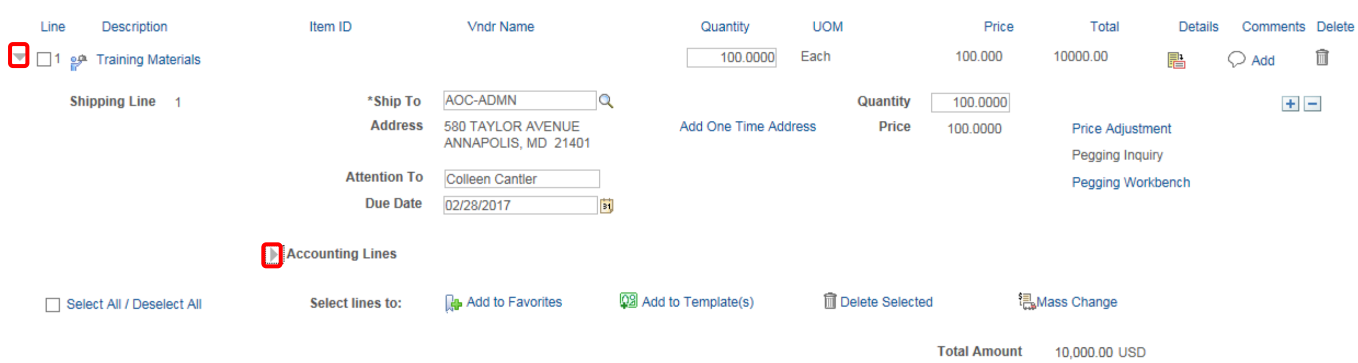

Click on the ▸ icon near **Line.** Then click on the ▸ icon to the left of **Accounting Lines.**

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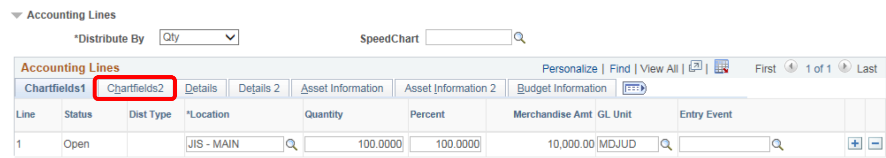
<td>12.</td>
<td>Click on the tab Chartfields 2 to view your chartfields.</td>
<td>
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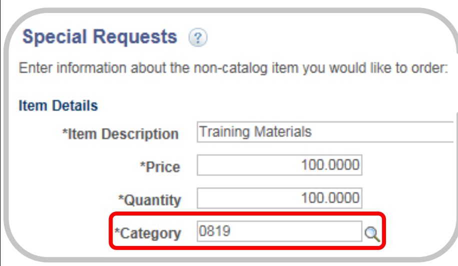
<tr>
<td>13.</td>
<td>If you need to change the PCA on the Req. line, you can do that by entering the PCA in the SpeedChart field. If you change the PCA, you'll have to re-enter the Approp Yr.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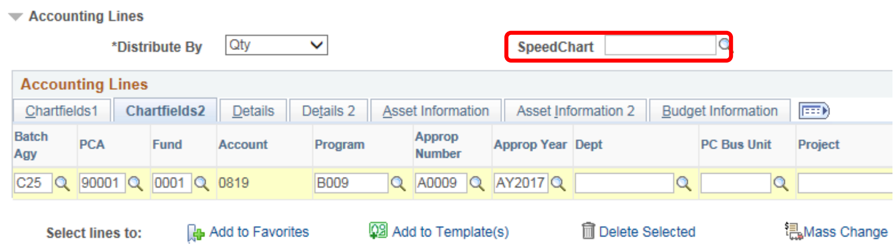
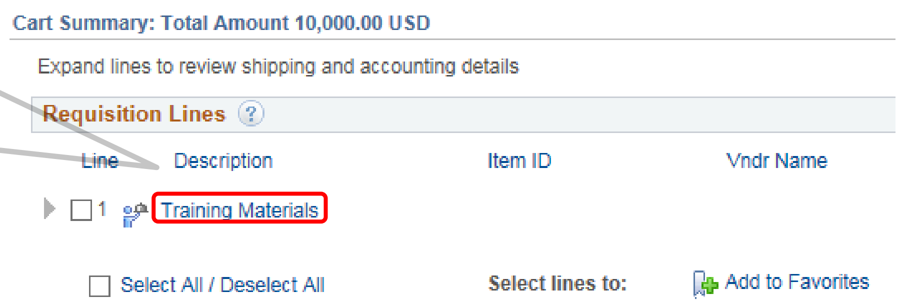
<td>

The Account field is populated based on the category you've chosen. <u>You cannot change the account # on this panel</u>. If you need to change the account, you can click on the line description (seen below) and then change the category, which will then default in a new Account value based on the newly selected Category.

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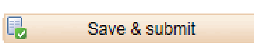
<td>14.</td>
<td colspan="2">Click the 

link at the bottom of the page.</td>
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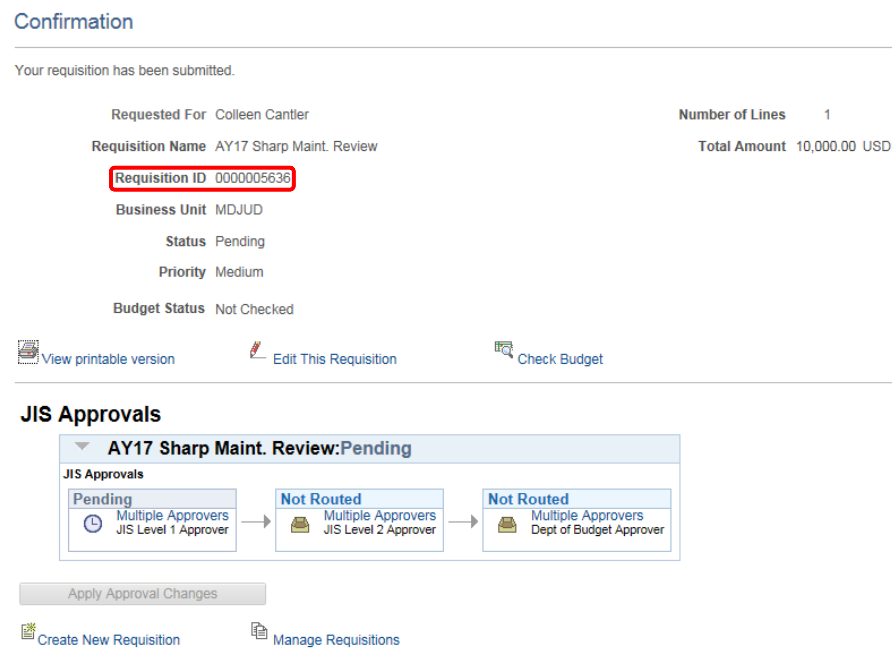
15. **On the Confirmation page, you'll see your Requisition number.**

Budget Check your Req. by clicking on the link Check Budget .

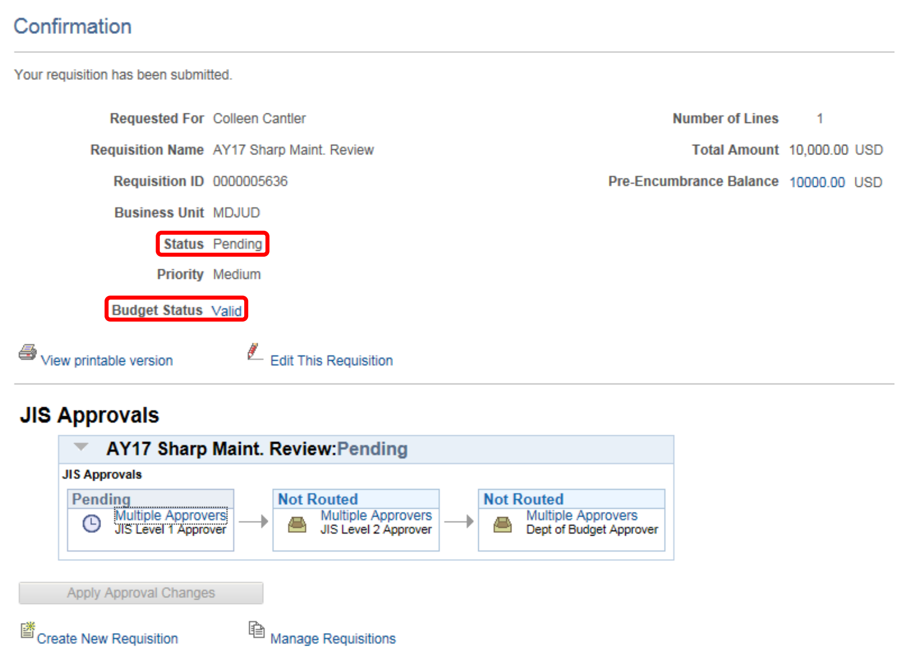
You'll see a processing graphic on the top right side of your screen.



16. **Once the Budget Check completes, verify that you Budget Status is Valid.**

Depending on the rules that apply to your area, your Requisition will be routed for the necessary Approvals. You'll receive email notifications and Worklist Items in your Worklist when:

1. **Your Requisition has been Approved.**
2. **The PO associated with your Req. is Dispatched to the Vendor.**



End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.